National Evaluation of the Primary and Behavioral Health Care (PBHCI) Integration Program: Wellness Services Tracking Tool

FAQs Updated April 2017

Using the Wellness Services Tracking Tool

What is the purpose of this tool?

Mathematica created the Wellness Services Tracking Tool (created in Microsoft Access) to assist grantees in recording and reporting clients' participation in the RFA-mandated wellness programs or evidence-based practices that are offered by or affiliated with your PBHCI program.

Is use of this tool mandatory? What if we already have a system in place?

You are <u>not</u> required to use this tool to track wellness services. The tool is a resource for grantees who do not already have a system in place for tracking wellness services. The tool can serve as an "attendee list" and can help you identify when clients are due for their next wellness service. However, using this tool will help you complete your quarterly progress reports for SAMHSA. Cohorts 8 and 9 can also submit the data captured in this tool to fulfill the electronic data request as part of the national cross-site evaluation.

What information does the tool record?

The "Grantee Information" tab of the tool records:

1. The name of the grantee
2. The grant number
3. The RFA/FOA-mandated wellness programs or evidence-based practices that your program offers

The "Client Entry" tab the tool records:

1. Client(s) TRAC/SPARS ID(s)
2. Date of service for the RFA/FOA-mandated wellness program or evidence-based practice
3. Type(s) of wellness service provided on a given date

Can I use this tool to track wellness services at multiple sites?

Yes, you can use the tool at different sites. In addition, the tool allows multiple record entry for every client enrolled in the PBHCI program even if they receive services at different sites.

Do I need to go to each individual client record within the tool to add a new date of service?

You have the option to scroll to an existing client record to add a new date of service or you can log a new entry for a client and the tool will automatically match that entry to their existing TRAC/SPARS ID.

Reports

What reports can we generate from this tool to help us deliver services?

There are two easy reports you can run. You can customize the date ranges for both reports.

The first report, titled "Clients with Wellness Services," generates a list of clients who have received wellness services and the count of each type of wellness service they have received. The bottom row of the report shows the total number of unique clients who received each service within your specified date range (***these numbers may help you complete your quarterly progress reports for SAMHSA***).

The second report, titled "Total Wellness Service Count by Type," shows the total number of encounters in each wellness services type.

Data Submission for Cohorts 8 and 9

If I use this tool to fulfill the electronic data request for the cross-site evaluation, where do I send the data?

Mathematica has assigned each grantee a user ID and password to access our secure SharePoint site. Please upload the most recent version of the Wellness Services Tool directly to this site: https://www.pbhcieval.com/Grantee/SitePages/Home.aspx. Please upload the entire database.

If your PBHCI program has not received an ID and password for the SharePoint site, email pbhcieval@mathematica-mpr.com or call 866-504-9640 to request this information.

Do I need to submit a file that only contains data for the past six-months or can I submit a file with cumulative data?

Either. If it's easier for you to submit a file that contains all cumulative data for PBHCI clients, we can use that file to "replace" or amend your earlier files. Conversely, if you find it easier to submit files that only cover the past six months (or quarter); you can submit the semi-annual or quarterly files and we can append it to your other files.

Getting Help

Who do I contact with questions about this tool? How can I get help?

Contact Mathematica with questions about this tool at pbhcieval@mathematica-mpr.com or 866-504-9640.